

## Case Study 4: HEARING LOSS



# Application

The Initial Interview Report can be seen as a “**SNAPSHOT**” of the client’s current situation. The counselor & other rehab team members can review it throughout the rehab process for easy, one-page reference. For example, you can attach it to your referrals for vocational services to quickly familiarize providers with the client’s situation. Likewise, it’s important that you, the writer, accurately *tell the client’s story*.

### INITIAL INTERVIEW

**Harriet**

03/15/05

**Reason for Referral:** Harriet is a 72-year-old woman referred to this program by her neighbor (Nancy), who accompanied her to her appointment today. She is requesting assistance in getting a part time job, and toward the purchase of hearing aids.

**Program Notifications:** Prior to proceeding with the interview, Harriet was provided information regarding the purpose of Vocational Rehabilitation, eligibility criteria, her rights, responsibilities, and remedies. She was provided with a written copy of such information for her review.

**Reported Disability:** When asked, Harriet reports that she lives with a hearing loss that interferes with her ability to hear on the phone or in noisy environments. Currently, Harriet relies on Nancy or others to decipher whether or not she hears things accurately. When she is not with Nancy, Harriet reports that she cannot understand what people are saying, but is too embarrassed to ask them to repeat themselves. In turn, she finds that she is becoming more and more isolated, which does not suit her because she has always enjoyed being around people.

**Work History:** Harriet has not worked in the past 10 years. Prior to that she worked as a receptionist for a local medical clinic for a period of 9 years. In that job, she answered the phone, scheduled appointments, and transcribed medical reports. She liked the work very much, but quit to spend more time with her husband who retired. Before her receptionist job, Harriet was homemaker.

With prompting from Nancy, Harriet shared with this counselor that she has been an active volunteer over the years. She has served as the secretary of her local church council for the past 8 years. She schedules the monthly council meetings, types the notes and uses email to send the notes to all members. She also helps operate the local Meals on Wheels program; she solicits drivers and helps coordinate the meal delivery schedules. Last, but not least, Harriet uses her word processing talents to do a quarterly newsletter describing the goings on of her extended family members who live in various parts of the United States. Harriet enjoys staying active.

**Functional Limitations/Impediments to Employment:** She would like to get a part time job to help her meet her expenses, but is concerned that her hearing loss will make it difficult for her to interview and interact on the job. Also, Harriet, who describes herself



Do you know the difference between a conductive and sensorineural hearing loss? Which is most likely for the elderly?

Information is key for clients and counselors!

Use your resources:

<http://www.dphhs.mt.gov/vocrehab/vrs/disabilityresourcecenter.shtml>



A skilled counselor will effectively solicit information from clients through open-ended questions and then reflect the “client’s voice” in case notes with direct quotes.

as “no spring chicken” is concerned that her age will interfere with her ability to secure employment.

**Educational History:** Harriet graduated from high school in 1962. She then attended Business College for one semester before getting married and having children.

**Social and Financial Considerations:** Harriet lives on Social Security benefits and a very small pension left by her husband, who passed away last year. She is barely able to meet her expenses, and has very little extra income to meet unexpected expenses or to participate in any additional activities. She is a proud woman and will not ask her children for assistance.

**Client’s Reported Vocational Interests and Goals:** Harriet enjoys people and would like to secure part time employment as a receptionist or administrative assistant. Toward that end, this counselor suggested that Harriet request letters of recommendation from those with whom she currently works. *“I can do that!”* was her enthusiastic reply.

**Counselor Observation and Actions:** Harriet is a lovely lady who presents herself in a friendly and dignified manner. Throughout our meeting today, Harriet often looked toward Nancy to confirm she was hearing correctly and responding appropriately to my questions. When she talked about feeling less confident and isolated, she became teary eyed, but quickly recomposed herself.

Harriet does not have health insurance and is not yet eligible for Medicare benefits through the Social Security Administration. Due to her lack of insurance and extra income, Harriet has not had her hearing tested. Therefore, this counselor scheduled her for a hearing evaluation with the audiology clinic near her home. Her evaluation is scheduled for **March 23 at 8 AM**.

A referral packet including release and authorization was completed. Once received, the audiology report will be reviewed to determine eligibility.

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Rehabilitation Counselor

Clyde received the audiology report, which revealed the presence of a moderately severe bilateral hearing loss that responds well to amplification. The audiologist recommends Harriet be fitted with aids following a trial with various aids to confirm which work best for her.



# Eligibility Determination

The VR counselor determines eligibility by always asking a series of **KEY QUESTIONS**:

1. Is there evidence of a physical or mental disability?
2. Does the disability prove to be an impediment to employment? In other words, does the disability interfere with the individual's ability to prepare for, secure, and maintain suitable employment?
3. Does the individual *require* services to prepare for, secure, and maintain employment?

The Certificate of Eligibility is documented proof that the questions have been asked and answered.

## CERTIFICATE OF ELIGIBILITY

**Harriet**

04/02/05

Harriet has a substantial impediment to employment in that the functional limitations resulting from her disability (moderately severe hearing loss, bilateral) significantly interferes with her ability to effectively communicate. Without amplification, Harriet is unable to hear, with any accuracy, what others are saying. Her inability to hear impedes her ability to confidently interview for employment or perform job duties such as greeting the public, answering the phone, and taking messages.

Harriet requires Vocational Rehabilitation Services, which will be the following:

1. **Prescribed Hearing Aids**
2. **Job Placement Assistance**
3. **Amplification Devices** for phones in home and work environments.

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Rehabilitation Counselor

## LETTER OF ELIGIBILITY

April 2, 2005

Dear Harriet:

I'm writing to inform you that you are eligible for services to help you prepare for and secure employment. Our next step is to meet and begin the development of your rehabilitation plan. I've scheduled an appointment for us to meet on:

**Thursday, April 12 at 10 AM**

If this time is not convenient for you, please call the office (123-4567) to reschedule.

To familiarize you with the process, I've enclosed a copy of the format for the "Individualized Plan for Employment (IPE), and the introduction to the plan entitled, "VR and Client Understandings," which outlines the process to write an IPE, your responsibilities and your rights. You do not have to complete the plan prior to meeting with me. We can work on it together.

Harriet, I look forward to meeting with you.

Clyde Caring, MS, CRC



Certification reflects evidence that:

- ☐ The eligibility determination occurred within 60 days of application date.
- ☐ A physical or mental impairment proves to be a substantial impediment to employment.
- ☐ At least one significant service is required to overcome an impediment to employment.



# Assessment & Planning

*In this phase, we help clients engage in exploration to help them discover their **DESTINATION** (vocational goal) and the **PROVISIONS** (services and supplies) they require to get there.*

## RATIONALE FOR GOAL AND SERVICES

**Harriet**

04/12/05

Harriet was in today as scheduled. Her friend, Nancy accompanied her. As requested, Harriet provided copies of two letters of recommendations from various professionals with whom she has recently worked. One letter is from the pastor of her church, and the other is from the director of the Meals on Wheels program. Both letters strongly endorse Harriet's abilities and describe her in glowing terms including: "tremendous asset to our program," "conscientious and dependable," and "I would not hesitate to hire Harriet if we had the funding."

An IPE outlining required services was completed on this date.

**CLIENT PERSPECTIVE:** Harriet has selected receptionist as her vocational goal. She supports this choice stating, *"I enjoy greeting people and making them feel comfortable. I also enjoy office work and believe that my skills make me a good candidate for employment in that setting. I enjoy a challenge."*

**GOAL COMAPTIBILITY:** Given her expressed interests and demonstrated abilities, as evidenced above, it appears Harriet has chosen a suitable vocational goal.

**SERVICE RATIONALE:** To achieve her goal, Harriet requires prescribed hearing aids. And, although Harriet is very articulate and likely to do well on her own, her age may be an unspoken liability. Therefore, Harriet requires the support of Job Placement Assistance. Harriet, who was provided information (brochures) and on all job placement providers, has chosen to work with Cathy Quick of Express Employment Services. A referral packet including release and authorization was completed on this date.

**EMPLOYMENT OUTLOOK:** According to the labor market statistics for this area, the number of administrative assistant positions is expected to increase.

**FINANCIAL CONSIDERATION:** Harriet lives on a fixed income with very little discretionary income. She does not have insurance.



The Rationale document demonstrates that the counselor has considered the feasibility of the IPE strategy to overcome impediments. It provides evidence that...

- Harriet's goal is compatible with his expressed interests, concerns, priorities, demonstrated strengths, abilities, and that...
- Harriet requires the identified services to achieve his goal, and that...
- Harriet was provided information enabling him to make an "informed choice" regarding his services and the vendors with whom he chose to work.

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# IPE Initiation & Follow Along

The IPE is the **ROAD MAP** to the client's goal or destination. It outlines the route (what the client and the VR program will do to the client achieve his goal) and the ETA (estimated time of arrival or goal end date). Clients and counselors can avoid getting lost with frequent referral to the map!

## INDIVIDUALIZED PLAN FOR EMPLOYMENT

**Name:** Harriet

**Plan Date:** 04/12/05

**My work goal:** Receptionist, Part Time

**Date to complete goal:** 04/12/06

**We have agreed the following services are required:**

Service(s)	Responsible Party	Amount	Provider(s)	Dates of Service(s)
Hearing Aids	Voc Rehab	\$1500	Hearing Associates	04/05-06/05
Job Placement Assistance	Voc Rehab	\$500	Kathy Quick	04/05-04/06

**Additional community and financial resources I will use to help me achieve my work goal:** None at this time.

**My responsibilities in showing progress toward my work goal:**

1. I will make appointment to be fitted with my hearing aids and will communicate closely with my audiologist to ensure they are properly and optimally adjusted.
2. I will meet with Deb once per week and will follow through with all recommended and agreed upon activities until I'm successfully employed.

**Schedule for Reviewing Progress:**

Deb and I will meet with Clyde once every 60 days to review my progress until I'm successfully employed. Once employed, I understand that my case will remain open for 90 days to ensure my success.

**First review appointment:** June 12, 2005 at 9 AM



An IPE that is accountable to the Rehab Act provides evidence that...

- all services are prior authorized and provided within the timeframe specified by the service start dates and the goal end date...
- comparable benefits and resources are explored...
- client responsibilities (objectives) are written in clear and measurable terms...
- Progress Review Schedule is clear, adherence to which will be reflected in subsequent Case Notes...

## INDIVIDUALIZED PLAN FOR EMPLOYMENT

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### **VR Counselor Considerations:**

1. Are Post Employment Services needed? YES ☐ NO ☒
2. Are Extended Employment Services needed? YES ☐ NO ☒ NA ☐  
If Extended Employment Services are needed, please describe the required services and identify the extended services provider.
3. Have VR goals, objectives and services been coordinated with the student's Individualized Educational Plan (IEP)? YES ☐ NO ☐ NA ☒

**Methods for providing or procuring goods and services:** The Vocational Rehabilitation program can provide vocational services directly. In addition, the agency can use purchase orders to procure goods and services from approved vendors. The bidding process is used when appropriate to purchase goods at the best available price. Comparable benefits, when available (resources from other programs or agencies), are utilized to meet rehabilitation needs. All services are provided in accordance with the Financial Need Standard specified by the Vocational Rehabilitation Program.

### **My comments about this plan:**

*"I enjoy the challenge of busy office work and enjoy working with the public."*

By signing this document I understand and commit to the responsibilities in my Plan. I have been given the opportunity to make informed choices about my work goal, the vocational services needed to achieve it, providers of the goods and services, and the methods available for procuring the services. I received a copy of this Individualized Plan for Employment (IPE) in a format that was understandable and appropriate for me.

If applicable, I was offered the opportunity to assign my **Ticket to Work** to Vocational Rehabilitation. YES ☐ NO ☐ NA ☒

Client: Harriet

Date: **041205**

Counselor: Clyde Caring

Date: 04/12/05

- ☐ the client was informed of the availability of Post Employment Services ...
- ☐ Extended Employment Services, if applicable, were addressed ...
- ☐ VR coordinated services with school personnel to assist students who are transitioning from school to work & that there was opportunity to complete an IPE before graduation...
- ☐ the client was involved in the development of the IPE (see "My comments..") and that...
- ☐ the IPE was developed within 120 days of date of application, or if not the case record justifies an extension of plan development time.

## IPE AMENDMENT

**Harriet**

06/12/05

Harriet, Kathy and this counselor met today as scheduled to review Harriet's progress. Harriet is very happy with her new aids. *"I can't believe how much I was missing or how loud my I played my TV! They (the aids) are just marvelous!"* She states she feels much more confident to go in public now. She even returned to her bridge league, which she enjoys very much.

With Kathy's assistance, Harriet has applied for several jobs and even had one interview. Although she feels that the interview went well, she was not offered the job, and can't help thinking that her age is a barrier. *"I just wish somebody would give me a chance to show how efficient I can be."* stated Harriet. As incentive to a potential employer, this counselor suggested that we amend Harriet's plan to include a paid work experience, wherein VR pays Harriet's wages and worker's compensation for 80 hours in exchange for an employment opportunity with a potential employer who has a need, but is reluctant to hire due to Harriet's lack of current work history. Not only would the experience help Harriet to prove herself, but it would also provide her with a stint of paid and current employment to add to her resume.

Harriet and Kathy agree and Harriet's plan was amended to include the following service.

SERVICE	RESPONSIBLE PARTY	COST	VENDOR	DATES
Work Experience	Voc Rehab	\$500	Express Services	06/05-12/05

Next Review Appointment: **August 12, 2005**

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Rehabilitation Counselor

### PROGRESS REVIEW

**Harriet**  
08/12/05

Harriet and Kathy were in today as scheduled. Since our last appointment, Harriet participated in a paid work experience at the local Red Cross. She answered phones, scheduled appointments and performed general office duties as requested. She enjoyed the opportunity very much. She states, *"I just loved it, Clyde. It was wonderful to feel useful, and I think I proved I can do a good job."* According to Kathy, the employer was "thrilled" with Harriet's work and they have offered Harriet a job. She is scheduled to begin work on August 15. She will work 20 hours per week, 10 to 2 and will earn \$7.50 per hour. Harriet is excited and reports that the hours are "ideal." She states, "I can't wait!"

We agreed to meet again near Harriet's 90<sup>th</sup> day of employment to ensure her satisfaction and success.

Next Review Appointment: **December 18 at 3 PM**

Clyde Caring, MS, CRC  
Rehabilitation Counselor





# Rehabilitation Outcome

In a successful case closure (26), the client's achievement of her goal and VR's contributions to that accomplishment are documented. In this case, a congratulatory handshake is in order! Sometimes, however, despite our best efforts, successful outcomes don't always occur. Sometimes clients relocate & other times life circumstances interfere. Either way, a respectful and courteous exchange between client & counselor, wherein the client knows she is welcome to reapply, is always desirable.

## CLOSURE SUMMARY

**Harriet**

12/18/05

Harriet was in today to meet with Kathy and this counselor to discuss her progress on her new job. Harriet positively glows when discussing her new job and her new co-workers. She reports, *"It's easy to be passionate about a job with such an important mission."*

Kathy reports that Harriet's supervisor just raves about her and stated, *"I don't know how we did without her!"* Given her success, Harriet, Kathy and I agreed to close her case. Harriet thanked us for our assistance and provided each of us a plate of Christmas cookies to show her appreciation.

## CLOSURE LETTER

December 18, 2005

Dear Harriet:

It was a pleasure meeting with you today. I'm so pleased to hear that you enjoy your new job, and that your employer recognizes your abilities and values your contributions. Once again, congratulations!

Through your own hard work and the services provided to you by this agency, you have successfully secured and maintained your employment for over 90 days. Therefore, as we discussed, it appears you require no further services at this time we agreed to close your case. However, please recall that you are welcome to contact me for assistance should you experience any difficulties related to your disability or continued employment. Assistance may be provided through the Post Employment Services Program.

Harriet, I wish you the very best.

Sincerely,

Clyde Caring, MS, CRC  
Rehabilitation Counselor

PS Thank you for the Christmas cookies. They were delicious!

CC APPEAL RIGHTS



Case documents such as a [Closure Summary](#) and/or the [Closure Letter](#) must provide evidence that...

- ☐ the client achieved the goal outlined in the IPE and that the goal remains suitable...
- ☐ the client expressed satisfaction with the job in a direct consultation between the client and the counselor and is in agreement with case closure...
- ☐ services made a significant contribution to the achievement of the goal...
- ☐ the client has maintained the job for at least 90 days...
- ☐ the client is earning a customary wage and that the client is being compensated at or above minimum wage, and that...
- ☐ the client has been informed of Post Employment services.